ROUTING AND RECORD SHEET									
SUBJECT: (Optional)			_						
Social Secur	rity Ear	nings St	mts for	Federal Employees Making FERS Decision					
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TO: (Officer designation, room number, and building)	D	ATE	OFFICER'S	COMMENTS (Number each comment to show from whom					
	RECEIVED	FORWARDED	INITIALS	to whom. Draw a line across column after each comment.)					
1. C/RD				Please make contact with Social Security Administration					
				and get a copy of the floppy					
2.				and get a copy of the floppy disk for PIA Programs for FERS.					
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Declassified in Part - Sanitized Copy Approved for Release 2012/07/02 : CIA-RDP89-00066R000800090005-3

Refer to:

Baltimore MD 21235

APR 23 1987

To Federal Personnel Directors:

Re: Social Security Earnings Statements for Federal Employees
Making FERS Decisions

On June 6, 1986, President Reagan signed into law an Act establishing the new Federal Employees Retirement System (FERS). The retirement legislation extends Civil Service employees two options:

- 1. Remaining in the current Civil Service Retirement System (CSRS), or
- Participating in the new Federal Employees Retirement System.

FERS participants receive benefits both from the new Federal employee pension system and from Social Security. There are some employees who may have worked under Social Security in the past and will need to request information from their records so they can better understand the projected value of the Social Security benefit to their overall benefits. The Social Security Administration (SSA) and the Office of Personnel Management (OPM) have developed a process to furnish earnings statements and coverage information during the FERS Open Season (July 1 through December 31, 1987) to help the employee make a decision on a retirement system.

The SSA and OPM process involves the use of a contractor to produce forms which Federal employees can use to obtain statements from their Social Security records. Shortly, SSA will provide a supply of forms to each Federal Agency for distribution to employees together with a return envelope so employees can request their earnings history. Each agency has the option of distributing the forms to all their FERS-eligible employees or advising their employees of the availability of the forms and distributing them on an "on-request" basis only. In order to keep the workload down and provide better service to employees who really need their Social Security earnings to make their FERS decision, the latter option is preferred.

Those employees who believe that they need their Social Security record for the FERS decision should promptly complete and return the form. A copy of the form is attached which includes name, Social Security number, date of birth, sex, current address and signature. Upon receipt of the form the input data will produce a statement from the system which shows coverage information and year-by-year earnings amounts. Statements should be mailed to employees 3 to 5 weeks after submission.

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In addition, SSA's Office of the Actuary has developed a personal computer program that can estimate a person's Social Security benefit based on his or her lifetime annual earnings under Social Security. If your agency would like a copy of the floppy disk containing this program, send a standard IBM-compatible PC disk (5 1/4" double-side, double density) or an IBM-compatible PC/AT disk (5 1/4" double-side, high density) to the following address:

"PIA Program for FERS"
Office of the Actuary
Social Security Administration
4-N-29 Link
6401 Security Boulevard
Baltimore, Maryland 21235

We will copy the program onto your disk and return it to your office with a brief instructional handbook. Please send only one request per agency. However, we encourage your agency to make as many copies as you wish from the copy you obtain from SSA. (The program is not copyrighted.)

If you are planning to prepare a covering memorandum to your employees about the Social Security form we are recommending the attached draft language.

Sincerely,

Antonia Lenane

Director

SSA FERS Task Force

Enclosures

8 1/2" per package

- 3 2/3" x { 100 items }

Form will be: Prefolded Packaged - size

(Pre-adressed)Standard

(FRONT)

Social Security Administration Post Office Box 4168 Iowa City, Iowa 52244-4168

## Dear Federal Employee.

On June 6, 1986, President Reagan signed into law an Act creating the new Federal Employees Retirement System. If you became a Federal employee before 1984, you will soon have to decide whether to join the new system or to remain in the Civil Service Retirement System. The Social Security Administration and the Office of Personnel Management (OPM) have developed some materials which will assist you in making this important decision.

If you are seriously considering joining FERS and have ever worked in a job covered by Social Security, you may need a copy of your Social Security earnings record. In June, OPM will distribute The FERS Transfer Handbook explain how to use your earnings record to make a FERS

If you need your earnings statement, complete this form and return it as soon as possible in the enclosed envelope. Since the FERS transfer period closes at the end of the year, we need your request by August 1987. You should receive a response within 3 to 5 weeks. Should you have any questions, please contact your personnel office.

The Social Security Administration is pleased to be able to provide you with the information you need to make your retirement system decision.

Sincerely, LnCas P. - Wardi Dorcas R. Hard Commissione

## PRIVACY STATEMENT

The Social Security Administration (S.A) is authorized to collect information asked on this form under section 205 of the Social Security Act, it is needed so SSA fin quickly identify your record and prepare the earnings statement you requested. While you are and prepare the earnings statement you requested. While you are not required to furnish the information, failure to do so may prevent your request from being processed. The information will be used primarily for issuing your earnings statement.

- GENERAL INSTRUCTIONS

  1. Complete this form only if:

   You are considering joining FERS

  AND
- AND
  You have worked in employment covered by Social Security.
  Enter your name and Social Security mumber on the form exactly as they appear on your Social Security and If your card is incorrect (for example, you changed your name because of marriage or divorce), contact your local Social Security office to correct your card before you send in this form.

## Declassified in Part - Sanitized Copy Approved for Release 2012/07/02 : CIA-RDP89-00066R000800090005-3 MARKING DIRECTIONS

- WARNING DIRECTIONS

   Use a soft lead pencit (do not use ink or fell-tip pen).

   Print one letter or number in boxes provided, and grid the corresponding oval below bach character.

   Completely erase marks you wish to change.

   Make no stray marks on either side of this sheet.

   Do not photo copy use only printed forms.

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USE SOFT LEAD PENCIL ONLY, DO NOT STAPLE OR ATTACH TAPE TO THIS FORM,

NOW TURN THIS FORM OVER AND COMPLETE SECTIONS D THROUGH J. YOU MUST SIGN AND DATE THE FORM (AS REQUESTED IN SECTION J) TO ALLOW FORM TO BE 3 PROCESSED.

ORM SSA-7004 FERS

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Dominican Republ 77 78 79 <u>රම්ත්ත්මර</u> 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 000000 0000000 00000000000 30000000000 00000000000 000000 000000000 PENALTY CLAUSE I am the individual to whom the record pertains. I understand that if I knowingly and willingly request or receive a record about an individual under false pretenses I would be guilty of a Federal crime and could be fined up to \$5,000. I authorize you to send the statement of my earrings to me through a processing 0000000 0000000 0000000 Dominican Republic El Salvador 00000 000 0000 000 00 contractor. Jamaica Mexico 0 0 Nicaragua Panama SOCIAL SECURITY Other (Specify Below) SECOND SOCIAL SECURITY NUMBER (If used) 90000000000 0000000000 0000000000 00000000009999999999 00000000000 0000000000 0000000000 0000000000 0000000000 0000000000 0000000000 00000000000 0000000000 0000000000 0000000000 0000000000 00000000000 THIS SECTION MUST BE COMPLETED NOTE: This form MUST BE SIGNED and dated

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within 60 days prior to receipt by Social Security Administration for it to be processed.

President Reagan recently signed into law an Act providing the new Federal Employees Retirement System (FERS). The retirement legislation extends to Civil Service employees two options:

- 1. Remaining in the current Civil Service Retirement System (CSRS), or
- 2. Participating in the new Federal Employees Retirement System.

FERS participants receive benefits both from the new Federal employee pension system and from Social Security. Many of you may have worked under Social Security in the past and may have a need to request information from your records so you can better understand the projected value of the Social Security benefit to the overall benefits. The Social Security Administration (SSA) and the Office of Personnel Management (OPM) have developed a process to furnish earnings statements and coverage information during the FERS Open Season (July 1 through December 31, 1987) to help you make a decision on a retirement system.

AGENCY: CHOOSE ONE ALTERNATIVE

The attached form can be used to get your earnings information from SSA. (DO NOT USE STAPLES ON THE FORM.)

OR

If you desire to get your earnings from SSA please (AGENCY SHOULD CUSTOMIZE).

Promptly complete and return the form, which includes name, Social Security number, date of birth, sex, current address and signature. SSA will produce a statement from the system which shows coverage information and year-by-year earnings amounts. You should receive a statement 3 to 5 weeks after submission.

To help keep the workload manageable, please request records only if needed. If you have never worked under Social Security or you have already made the decision, do not send in the request form. Also, if you were covered under FERS before January 1984 you will not need to submit a form.

You are encouraged to use the Social Security earnings information together with a <u>FERS Transfer Handbook</u>, which will be provided by OPM, to determine how FERS coverage would apply to you personally.